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ABSTRACT

Transforming the welfare system presents governors with unique opportunities, hard choices, and creative challenges. Change will require continued commitment to welfare, educational reform, and economic development. Governors can improve the status of private citizens and private businesses. The Family Support Act of 1988 signaled major changes in the nation's welfare system. The Job Opportunities and Basic Skills Training (JOBS) program under Title II of the act is patterned after earlier welfare-to-work initiatives and is based on success in helping recipients of public assistance obtain jobs. The legislation was supported by numerous organizations in the crusade for welfare reform. It is imperative that such commitment be continued and that the flexibility afforded in the legislation be used to create improved service delivery systems for individuals traditionally locked out of the labor market. The Family Support Act can break the cycle of poverty by providing high quality services to children of JOBS participants. The funding provisions for JOBS and supportive services are complex. By targeting resources to potential long-term recipients, states should adopt strategies for the development of human capital. This focus necessitates more expensive education and skill training, but a human resource development approach can yield larger and more long-term savings for programs. Governors will provide effective coordination with other programs, which will be a major determinant in achieving the goals of the Family Support Act. Successful implementation of a human resource strategy will require the support and involvement of the educational community. Supportive services, including child care, will be necessary to allow recipients to overcome barriers to participation. Research indicates that early interventions may be instrumental in reducing high school dropout rates, teen parenting, and future welfare dependency. (13 references) (NLA)

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A Governor's Guide to the Family Support Act: Challenges and Opportunities

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A Governor's Guide to the Family Support Act: Challenges and Opportunities

By Linda McCart

Social Services Program
Human Resources Policy Studies
Center for Policy Research

National Governors' Association

The National Governors' Association, founded in 1908 as the National Governors' Conference, is the instrument through which the nation's Governors collectively influence the development and implementation of national policy and apply creative leadership to state issues. The association's members are the Governors of the fifty states, the commonwealths of the Northern Mariana Islands and Puerto Rico, and the territories of American Samoa, Guam, and the Virgin Islands. The association has seven standing committees on major issues: Agriculture and Rural Development; Economic Development and Technological Innovation; Energy and Environment; Human Resources; International Trade and Foreign Relations; Justice and Public Safety; and Transportation, Commerce, and Communications. Subcommittees and task forces that focus on principal concerns of the Governors operate within this framework.

The association works closely with the administration and Congress on state-federal policy issues through its offices in the Hall of the States in Washington, D.C. The association serves as a vehicle for sharing knowledge of innovative programs among the states and provides technical assistance and consultant services to Governors on a wide range of management and policy issues.

The Center for Policy Research is the research and development arm of NGA. The center is a vehicle for sharing knowledge about innovative state activities, exploring the impact of federal initiatives on state government, and providing technical assistance to states. The center works in a number of policy fields, including agriculture, economic development, education, environment, health, social services, training and employment, trade, and transportation.

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Preface

The catalyst for social, attitudinal, behavioral, and cultural change may have arrived with the Family Support Act of 1988. The primary goal of the statute is to transform the welfare system from one that fosters dependency to one that encourages individual and family self-sufficiency. At the same time, the legislation offers Governors and other state leaders the opportunity to implement institutional reform across many systems so that individuals have easy access to the programs and services they need to help them become economically independent and, subsequently, to lead more productive lives. Governors also can take this opportunity to act on their concerns for improving the lives of poor children. State and local leaders can be encouraged to create comprehensive community strategies to break the cycle of poverty and avoid future generations of dependents on public assistance.

The impetus for change in the nation's primary support system for the disadvantaged was the result of successful welfare-to-work initiatives operated in states and localities during the 1980s and subsequent evaluations verifying their effectiveness. Incentives for reform also came from a growing concern about rising caseloads in the Aid to Families with Dependent Children (AFDC) program, in which a disproportionate number of young, never-married mothers remained mired for many years. Research confirming direct linkages between the lack of basic skills and welfare dependency, out-of-wedlock births, school failure, crime, and other social ills further fueled demands for changing the system.

Much remains to be learned about which types of program activities are most effective in helping specific recipients enter the labor market. States have learned that programs to help individuals become economically independent must be flexible enough to meet diverse individual and community needs. Such programs are more effective when resources from other programs are linked to create, expand, and improve successful ventures. The earlier welfare-to-work experiments also helped clarify the need for child care and continuing medical benefits to enable recipients to participate in activities and, later, to keep their jobs. Such benefits are entitlements under the legislation. In addition, the Family Support Act mandates increased paternity establishments and strengthens child support enforcement to provide additional income for AFDC families who leave the welfare rolls for jobs.

Change will be difficult, but it is not impossible to achieve. It will require continued commitment and dedication from Governors who led the movement for welfare reform. Efforts to radically change the way agencies have been providing services to welfare recipients already have begun in many states. Governors are in the forefront of initiatives to get all the relevant players – educators and officials in child care, welfare, and employment and training – to the table through interagency task forces and other cooperative efforts. With increasing demands on state budgets, it is incumbent upon Governors to accept the challenges presented by the statute.

The time to act is now. Governors recognize that their most valuable resources are the individuals and families within their respective states. Each can inspire other state leaders to harness the momentum garnered with passage of the legislation – and

around demands for education reform, movements to establish family support programs, and excellence at work initiatives – to create a comprehensive, strategic approach to development of the state's human resources.

Acknowledgements

The Consortium for Implementation of the Family Support Act was formed in spring 1989 to provide guidance and technical assistance to states and localities as they implement the complex provisions of the legislation. The consortium includes the National Governors' Association (NGA), the American Public Welfare Association (APWA), the Council of Chief State School Officers (CCSSO), and the National Association of Counties (NACo). The project is coordinated by the Social Services Program of the NGA Center for Policy Research.

This report is part of the consortium's ongoing activities. It is designed to provide Governors and their staff with current information on the status of state implementation of the Job Opportunities and Basic Skills Training program. In addition, the report delineates major implementation challenges that have surfaced and discusses the role of Governors in meeting them.

NGA is grateful to the consortium members for their input and support during the preparation of this report. They are Cynthia Brown, Council of Chief State School Officers; Marilou Fallis, National Association of Counties; and Richard Ferreira, American Public Welfare Association.

Special thanks are extended to John Lanigan of the Ford Foundation, and to Susan Blank of the Foundation for Child Development, for their comments and assistance. The consortium and this report are supported by grants from these foundations.

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Executive Summary

The Family Support Act was signed into law in October 1988, signaling major changes in the nation's welfare system. The legislation seeks "*to revise the AFDC program to emphasize work, child support, and family benefits . . . to encourage and assist needy children and parents . . . to obtain the education, training, and employment needed to avoid long-term welfare dependence.*" The Job Opportunities and Basic Skills Training (JOBS) program under Title II of the act is patterned after the earlier welfare-to-work initiatives operated during the 1980s. It is based on research that verified the success of these programs in helping recipients of public assistance obtain jobs.

The legislation drew widespread support from numerous organizations, with Governors and human services administrators leading the crusade for welfare reform. It is imperative that such commitment be continued, and that the flexibility afforded in the legislation be used to create improved service delivery systems for individuals traditionally locked out of the labor market. The Family Support Act also can be used to break the cycle of poverty by providing quality services to children of JOBS participants.

The funding provisions for JOBS and supportive services are complex. Three different federal matching rates are applicable. Conditions for states receiving the higher federal matching rates include maintaining fiscal 1986 spending levels for programs designed to reduce welfare dependency, ensuring nonsupplantation of existing funds, meeting mandatory participation rates, and spending a minimum of 55 percent of all JOBS funds on three target groups. Major issues around JOBS funding that have surfaced include a federal mandate that all state matching funds for JOBS be under the direct administrative control of the Title IV-A agency (welfare), disapproval of the use of Title IV-A "special needs" funds for JOBS-related services, and the difficulties in determining who can be counted as a JOBS participant.

By targeting resources on potential long-term recipients, the legislation implies that states should adopt strategies for the development of human capital. This focus necessitates more expensive services, such as education and skill training, than were usually offered through earlier welfare-to-work programs. A human resource development approach will limit initial savings, but it can yield larger and more long-term savings, with more case closures and less return to welfare further down the line. States must not overpromise what JOBS can deliver or underemphasize the program's great potential.

Effective coordination with other programs will be a major determinant in achieving the goals of the Family Support Act. Governors will need to provide the leadership necessary for establishing successful linkages. State fiscal constraints and declining federal support of service programs demand that agencies combine resources to enhance, expand, and improve existing programs. Where gaps exist, JOBS can be used to create new programs. Collaborative ventures will not be easy due to turf issues, differing program goals, diverse governing structures, and multiple funding streams. Several activities will make institutional change easier, starting with open and

frequent communication among agencies and the formulation of clear objectives for JOBS.

Successful implementation of a human resource strategy will require the support and involvement of the education community. Reports of a shrinking workforce and increased employer demands for more highly skilled employees bode well for individuals traditionally locked out of the labor market. At the same time, these factors also require development of basic and problem-solving skills, good work habits, and creative thinking. To facilitate recipients' involvement, educators must understand their special needs and adapt instructional methods to make learning more relevant for them. Supportive services, including quality child care, will be necessary to allow recipients to overcome barriers to participation.

Opportunities also exist under the Family Support Act to address the needs of poor children by providing quality early childhood development programs, expanding assessments to also address family needs, and establishing family literacy programs. Teen parenting skills can be incorporated into educational programs or be provided as a supportive service. Child health screenings and information on selecting appropriate child care can be included in case management services. Research indicates that these early interventions may be instrumental in reducing high school dropout rates, teen parenting, and future welfare dependency.

The evidence is clear. Rising welfare caseloads and increasing numbers of children growing up in poverty demand that systems change to enable more individuals to have an opportunity to secure jobs and enjoy the benefits of employment. The Family Support Act can be the catalyst to redesign service delivery systems to make them more accessible and more responsive to client needs.

Transforming the welfare system presents Governors with unique opportunities, hard choices, and creative challenges. Change will require continued commitment to welfare reform as well as to reforms already initiated in education and economic development. Governors can play a significant role in these efforts by ensuring that they are all clearly focused on improving the status of private citizens and private businesses.

1. A Status Report on JOBS

Introduction

Welfare reform became a reality in October 1988 with the passage of the Family Support Act (Public Law 100-485). Following two years of intensive work, heated debates, and input from numerous states, public interest groups, and advocacy organizations, the 100th Congress approved a measure that encourages states to transform AFDC from an income assistance program to a program designed to foster self-sufficiency. The primary vehicle for this change is the Job Opportunities and Basic Skills Training program.

Labeled the "Governors' bill" by Senator Moynihan, the Family Support Act (FSA) gives states the opportunity to design a blueprint for enhancing the scope and diversity of services available to poor parents and their children. It provides the impetus to restructure service delivery systems in support of the family unit, giving parents the opportunity to realize their full potential. Governors can use JOBS to address the needs of children in AFDC households by ensuring that programs include quality child care, parenting instruction, family assessments, and quality case management services. FSA also challenges states to change public attitudes and perceptions about welfare and the people who survive on monthly payments substantially below official poverty guidelines as well as to dispel the myth that recipients "don't want to work."

State experience has demonstrated that with appropriate services, individuals who receive AFDC can and do work and usually prefer jobs over receipt of public benefits. Studies by the Manpower Demonstration Research Corporation (MDRC) of eight state welfare-to-work initiatives reveal that recipients view work requirements in public assistance programs as fair and needed. Other data suggest that the general public also supports programs that include a quid pro quo – AFDC benefits and assistance in securing employment in exchange for daily attendance in a vocational training program and participation in a peer support group.

Having succeeded in pushing the bill through Congress and securing approval from the administration, Governors recognize that they cannot afford to let other state needs supersede their commitment to improving the delivery of services to welfare recipients and their families. By integrating welfare reform with education reform and economic development efforts, Governors also can use the Family Support Act as the catalyst for developing comprehensive strategies for achieving educational excellence and state economic success. Dramatic changes are required in welfare, health care,

education, and employment and training institutions, and the legislation can serve as a springboard for comprehensive restructuring in these areas.

The Family Support Act

The Family Support Act amended Title IV of the Social Security Act. Provisions in the legislation strengthen states' ability to establish paternity and collect child support (Title I); enhance education, training, and employment opportunities for applicants and recipients of AFDC (Title II); and establish support services, including child care, as an entitlement for AFDC applicants and recipients (Title III). FSA also:

- Mandates that states provide AFDC benefits for two-parent families by October 1, 1990;
- Adjusts earned income disregards;
- Allows Native American tribes and Alaskan native organizations to apply to run their own Job Opportunities and Basic Skills Training programs; and
- Authorizes demonstration projects to explore innovative approaches to enhancing self-sufficiency.

Demonstration Projects Under the Family Support Act

The following demonstration projects are authorized under the Family Support Act:

- **Projects to test the effects of early childhood development programs, to encourage innovative education and training programs for children, and to ensure long-term family self-sufficiency through community-based services;**
- **Projects to encourage states to employ parents receiving AFDC as paid child care providers;**
- **Projects to test alternative definitions of unemployment, other than the 100-hour rule currently used in the AFDC Unemployed Parent Program (to be awarded during 1990);**
- **Projects to address absent parents' child access problems;**
- **Projects to expand the number of job opportunities available to certain low-income persons (to be awarded to nonprofit organizations during 1990);**
- **Projects to provide counseling and services to high-risk teenagers; and**
- **Projects to provide services under JOBS to noncustodial parents who are unemployed and thus unable to meet their child support obligations (to be implemented during 1990).**

Governors played a crucial role during the legislative debates that helped shape the final provisions of FSA. Drawing on successful state experiences in operating welfare-to-work initiatives under Work Incentive (WIN) Demonstration authority (Omnibus Budget Reconciliation Act of 1981, Public Law 97-35), Governors, human services administrators, and their national organizations combined forces to insist that the new law be flexible enough to enable states and localities to implement and continue programs and activities that meet the diverse needs of their AFDC populations.

NGA, APWA, and NACo, joined by CCSSO, continued lobbying through publication of the final regulations to help ensure that the congressional intent of the legislation was adhered to, and that the regulations were not overly prescriptive. These organizations also have been active in advocating technical assistance to states and localities as programs are implemented under FSA.

The mandatory programs that FSA requires may succeed in reducing welfare caseloads, especially in states with low AFDC payment standards. However, even with full-time, minimum-wage jobs, the majority of families will remain in poverty, with all its attendant problems (see figure). Fortunately, Governors and other state leaders can use the mandates in FSA to restructure service delivery systems, thus facilitating greater access and enabling large numbers of recipients to take their first steps toward self-sufficiency.

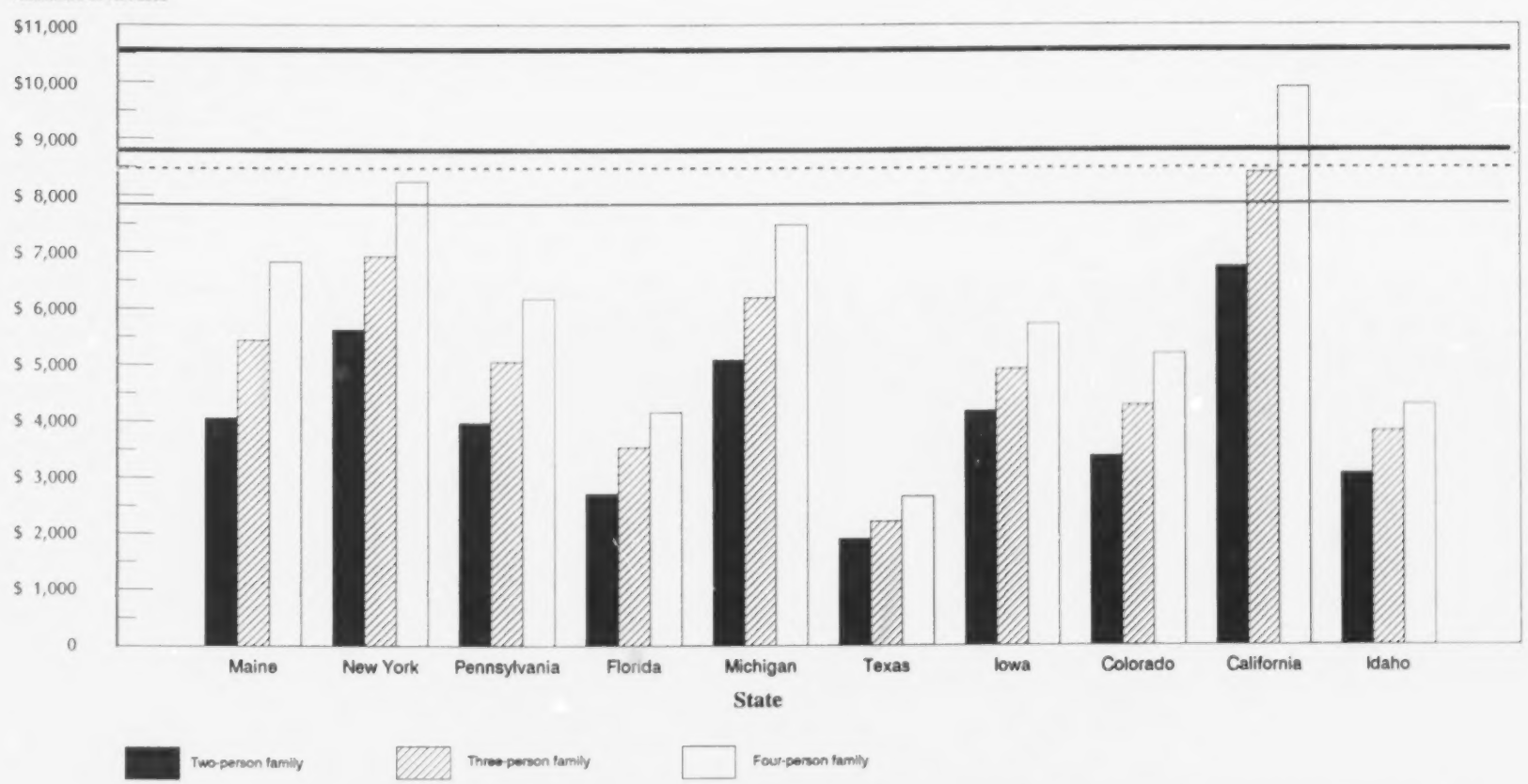
1990 Federal Poverty Income Guidelines*

Size of Family Unit	*Monthly Amount***	*Annual Poverty Guideline*
1	$ 523	$ 6,280
2	702	8,420
3	880	10,560
4	1,058	12,700
5	1,237	14,840
6	1,415	16,980
7	1,593	19,120
8	1,772	21,260

NOTES: * The poverty guidelines are applicable to all states (except Alaska and Hawaii) and to the District of Columbia.
**The annual poverty threshold for each family unit size was converted to a monthly amount and rounded to the nearest dollar.

SOURCE: 55 *Federal Register* 5665, February 16, 1990.

Comparison of AFDC Grant Amounts with 1990 Poverty Guidelines and Minimum Wage Jobs for Selected States


AFDC
Annual Benefits
$11,000
$10,000
$ 9,000
$ 8,000
$ 7,000
$ 6,000
$ 5,000
$ 4,000
$ 3,000
$ 2,000
$ 1,000
0
Maine
New York
Pennsylvania
Florida
Michigan
Texas
Iowa
Colorado
California
Idaho
State
Two-person family
Three-person family
Four-person family
1990 Poverty Income Guideline for a three-person family in all states (except Alaska and Hawaii) and the District of Columbia ($10,560).
Gross earnings based on employment of 40 hours per week at $4.25 per hour (minimum wage eff. 4-1-91) x 4.3 weeks x 12 months for annual gross earnings of $8,772.
1990 Poverty Income Guideline for a two-person family in all states (except Alaska and Hawaii) and the District of Columbia ($8,420).
Gross earnings based on employment of 40 hours per week at $3.80 per hour (minimum wage eff. 4-1-90) x 4.3 weeks x 12 months for annual gross earnings of $7,843.

SOURCE: U.S. House of Representatives, Committee on Ways and Means, *Overview of Entitlement Programs: Background Material and Data on Programs Within the Jurisdiction of the Committee on Ways and Means*, 101st Congress, 2nd session, June 5, 1990.

The effectiveness of programs and activities implemented under FSA authority will depend on several factors. These include the level of state investment in programs to move AFDC recipients into the workforce, state economic conditions, leadership, program expectations, linkages with education, risk taking, flexibility, coordination, legislative and public support, and an understanding of the hopes and needs of poor persons. Significant changes will be needed. The vision that led to congressional approval must now be communicated to agency directors, staff, and recipients alike. Governors have a real opportunity to continue their role as advocates for reduced welfare rolls, effective service delivery systems, and improved lives.

This report provides an update on federal and state activities since approval of FSA with regard to the Job Opportunities and Basic Skills Training program, and explores in greater detail factors necessary to its success. As identified by state and local officials involved in JOBS implementation, these factors are: funding and its impact on program design; collaboration with other agencies; and establishment of effective linkages with education.

JOBS Implementation Status

Title II of the Family Support Act replaces, consolidates, and expands prior authority for education, training, and work programs, contained in Title IV-A and Title IV-C of the Social Security Act, by creating a new Title IV-F. Job Opportunities and Basic Skills Training programs under Title II of FSA could have been implemented as early as July 1, 1989, and must be established by all states no later than October 1, 1990. The JOBS program must be operating in all feasible subdivisions of the state by October 1, 1992.

State Implementation. Fifteen states, all with some experience in operating welfare-to-work initiatives, were approved by the U. S. Department of Health and Human Services (HHS) to begin JOBS programs on July 1, 1989. In seven of these states – Connecticut, Massachusetts, Michigan, Minnesota, Oklahoma, Rhode Island, and Wisconsin – implementation of JOBS was simply a matter of submitting revised state plans for current activities, since their existing programs were operating statewide and were consistent with the mandates and options included in the JOBS regulations. The remaining eight states – Arkansas, California, Georgia, Iowa, Maryland, Nevada, New Jersey, and Ohio – were providing all the required activities in selected locations but will need to expand their programs to meet the statewide mandate by 1992.

An additional ten states began operating JOBS on October 1, 1989. Delaware, Florida, Kansas, Nebraska, New Hampshire, Pennsylvania, South Carolina, South Dakota, Utah, and West Virginia also had prior experience with welfare-to-work initiatives. Two more states – Colorado and New Mexico – received approval to begin JOBS on January 1, 1990. Three states (Alabama, Illinois, and North Dakota), as well as the District of Columbia and the Virgin Islands, started JOBS on April 1, 1990. The effective date of JOBS implementation for Missouri, Montana, and Wyoming was July 1, 1990, with the remaining states to implement JOBS effective October 1, 1990. As of July 1, 1990, a total of fifty Native American tribes and Alaskan native organizations had received approval to run their own JOBS programs; HHS anticipates that up to

State JOBS Implementation Dates

State	*Implementation Date*
Alabama	April 1, 1990
Alaska	October 1, 1990
Arizona	October 1, 1990
Arkansas	July 1, 1989
California	July 1, 1989
Colorado	January 1, 1990
Connecticut	July 1, 1989
Delaware	October 1, 1989
District of Columbia	April 1, 1990
Florida	October 1, 1989
Georgia	July 1, 1989
Hawaii	October 1, 1990
Idaho	October 1, 1990
Illinois	April 1, 1990
Indiana	April 1, 1990
Iowa	July 1, 1989
Kansas	October 1, 1989
Kentucky	October 1, 1990
Louisiana	October 1, 1990
Maine	October 1, 1990
Maryland	July 1, 1989
Massachusetts	July 1, 1989
Michigan	July 1, 1989
Minnesota	July 1, 1989
Mississippi	October 1, 1990
Missouri	July 1, 1990
Montana	July 1, 1990
Nebraska	October 1, 1989
Nevada	July 1, 1989
New Hampshire	October 1, 1989
New Jersey	July 1, 1989
New Mexico	January 1, 1990
New York	October 1, 1990
North Carolina	October 1, 1990
North Dakota	April 1, 1990
Ohio	July 1, 1989
Oklahoma	July 1, 1989
Oregon	October 1, 1990
Pennsylvania	October 1, 1989
Puerto Rico	October 1, 1990
Rhode Island	July 1, 1989
South Carolina	October 1, 1989
South Dakota	October 1, 1989
Tennessee	October 1, 1990
Texas	October 1, 1990
Utah	October 1, 1989
Vermont	October 1, 1990
Virginia	October 1, 1990
Virgin Islands	April 1, 1990
Washington	October 1, 1990
West Virginia	October 1, 1989
Wisconsin	July 1, 1989
Wyoming	July 1, 1990

SOURCE: U. S. Department of Health and Human Services, Family Support Administration.

eighty tribes will have JOBS operational by October 1990. (See table for JOBS implementation dates.)

Federal Activities. The Family Support Administration of HHS met the statutory deadline of October 13, 1989, for issuance of the final regulations, and for the most part, states were pleased. The regulatory provisions incorporate many of the comments received on the proposed regulations, and the preamble explains why suggested changes were not adopted.

Although the preamble and a November HHS conference helped clarify many of the early issues, numerous questions have since surfaced about issues that have not yet been resolved. Many of these should be answered in soon-to-be-released action transmittals, though issues surrounding the child care guarantee will continue to concern states for the foreseeable future. This is due, in part, to restrictions on the amounts states can spend for child care, and to a prohibition against using Title IV-A (AFDC) and/or JOBS funds for activities to increase or upgrade the overall capacity of the child care delivery system. Such a prohibition limits many states' ability to address the shortage of child care slots. The parental choice provision that requires states to pay for any child care, including self-arranged and unlicensed care, also complicates implementation of JOBS. The provision conflicts with numerous existing state laws that restrict the use of public funds for unlicensed child care.

Revised fiscal 1990 JOBS allocations were issued on February 13, 1990. Several states received amounts significantly below anticipated allocations. (Shifts in AFDC caseloads and actual data on adult recipients during fiscal 1989 account for the differences in anticipated and actual JOBS allocations.) Officials from HHS predict that only 50 percent of the capped entitlement of $800 million will be spent by states in fiscal 1990, due to late implementation dates and the inability of some states to produce the state match required to draw down their full share of federal funds. HHS has requested the full $1 billion specified in FSA for fiscal 1991.

A contract for the eight-year evaluation of the effectiveness of different approaches to service delivery and of their impact on participants was awarded to the Manpower Demonstration Research Corporation in October 1989. The study mandated by FSA also will include an evaluation of the impact of JOBS on children in AFDC households. MDRC has received letters of interest from twenty-six states that wish to have sites included in the study; ten sites will be selected over the next eighteen months. HHS will pay for most of the costs of this comprehensive evaluation.

Oversight Hearings. The first hearing on JOBS implementation was held on February 26, 1990, by Senator Daniel P. Moynihan (D-N.Y.), Chairman of the Senate Finance Subcommittee on Social Security and Family Policy. Primary areas of concern were durational participation requirements, tracking and verifying actual attendance in specific activities, and delay in appointing an assistant secretary for the Family Support Administration. (Jo Anne B. Barnhart was nominated by President Bush in early March 1990 and confirmed by the Senate in April.) Senator Moynihan stated that changes to the statute would not be considered for at least another year, and that the Senate would look to the Governors for suggested improvements.

A second hearing was held by the Senate Finance Subcommittee on June 12, 1990. The focus was on learnfare programs, particularly Wisconsin's Learnfare ex-

periment with teens and the recently approved waiver by HHS enabling the state to also sanction elementary children who fail to meet strict school attendance requirements. Although the testimony revealed nothing new in the controversial program, it was learned that a new state audit found serious errors in program operation. (The Milwaukee Learnfare program was suspended as of July 10, 1990, under a temporary injunction resulting from a class action lawsuit that challenged the sanction notification and other administrative procedures. Learnfare initiatives in Massachusetts and Tennessee have been put on hold.)

Representatives Tom Downey (D-N.Y.) and Nancy Johnson (R-Conn.) of the House Ways and Means Subcommittee on Human Resources held a hearing on FSA in San Diego on March 26, 1990. Concerns over participation rate requirements were revisited, and doubts about regulatory limitations on child care rates were expressed.

Arkansas Governor Bill Clinton testified during the second House hearing in Little Rock on April 30, 1990. A recurring theme was the need to address rural concerns, especially the need for more jobs and for transportation services.

State Implementation Studies

Several JOBS implementation surveys have been conducted since FSA was signed into law. (See appendix for a list of the surveys.) While each survey was directed toward a different audience, funding was the overriding concern expressed by respondents to all the surveys. Both Congress and HHS believe that the federal allocation for JOBS is adequate to provide the required services; both also predict that many states will not be able to provide the required state match. States' inability to draw down their full JOBS entitlement will, of necessity, limit the range of program services that can be offered and the number of individuals who can be served.

Other implementation concerns voiced in the surveys included insufficient child care resources (slots and funds); difficulties in forming linkages with education providers; structural limitations of education programs; inadequate resources to establish automated tracking and reporting systems; states' inability to meet participation rates; and the dearth of transportation services for recipients in rural areas.

On a more positive note, the surveys revealed a concerted effort by a majority of states to design intensive, comprehensive programs to help individuals become economically self-sufficient by securing jobs that pay more than the minimum wage. Highlights of the surveys' findings include:

- Most states plan immediate statewide implementation of JOBS, rather than a phase-in as allowed under the regulations.
- Thirty-six states have conducted, or plan to conduct, demographic studies of potential participants.
- A majority of states will provide some form of case management services and will use client/agency agreements to facilitate the transition from welfare to work.
- Twenty-seven states will offer all four optional components – job search, community work experience, work supplementation, and on-the-job train-

ing. Job search will be offered by all states, and work supplementation is the component least likely to be offered.

- Most states have conducted market rate surveys to determine prevailing child care costs, and many states have increased rates for child care subsidies.
- A majority of states apparently regard the coordination mandate with great seriousness. These states are diligently working with Job Training Partnership Act (JTPA) programs, employment service programs, Head Start programs, community-based literacy and skill training programs, vocational-technical schools, community colleges, and other organizations that provide child care, education, training, and employment services, and/or the necessary support services.

Other state concerns that have been voiced since the implementation studies were conducted include HHS disapproval of the use of Title IV-A "special needs" funds for education- and training-related services, as was allowed under earlier welfare-to-work programs; HHS reluctance to allow states to establish alternative target populations (other than those defined in FSA); HHS refusal to consider study time toward the twenty hour per week participation requirement, thus discouraging states from providing postsecondary education as a JOBS activity; and HHS disallowance of claims for federal reimbursement when the state match for JOBS was provided by other than the IV-A agency.

Conclusion

The Family Support Act of 1988 implies that JOBS programs should emphasize development of human capital by targeting those groups that are hardest to serve. This focus suggests more expensive services than those generally offered under earlier welfare-to-work initiatives. The regulations also impose participation rate requirements, mandates that urge serving increased numbers of recipients. With declining growth in state revenues and competing demands from education, Medicaid, corrections, infrastructures, and the environment, FSA presents Governors with unique opportunities, hard choices, and creative challenges.

Governors' staff, state and local human services administrators, federal officials, and staff from organizations who see the Family Support Act as a vehicle for promoting institutional change – all say that the major challenges in implementing JOBS are obtaining adequate funding for programs and services, coordinating diverse delivery systems, and engaging the education community's support and involvement. The remainder of this report explores these issues in depth and offers suggestions on how to address these challenges.

2. Wrestling with the Complexities of JOBS Funding

Introduction

Given the challenges of designing and implementing a complex program amidst austere fiscal conditions, changing political climates, and limited knowledge about which services work best for particular groups, it is critical that JOBS programs avoid promising too much and delivering too little. A clearly defined mission statement is imperative. It can inform funding decisions by articulating realistic expectations of what will be accomplished under the program and what it will cost. A focused goal can also serve as the basis for enhanced accountability at the state, local, and provider levels.

The funding provisions in FSA and the JOBS regulations are complex. Requirements for maintenance of effort, nonsupplantation, and expenditures on target groups, together with participation rate mandates, all affect the rate at which federal financial participation is available for various program activities. To aid those who are not experts in understanding these financial provisions, the information has been condensed, with the most salient points highlighted.

On Costs:

- State and local government costs for providing welfare-to-work programs will increase, at least in the short run.
  - Federal law prohibits any reduction in total state appropriations (including appropriations to non-IV-A agencies) for programs designed to reduce welfare dependency.
  - Programs currently providing services to AFDC recipients may not curtail such services or reallocate existing resources to non-AFDC clients.
  - While existing state appropriations may be used to generate federal matches under the JOBS program, these appropriations must be made to, or transferred to the control of, the IV-A agency and then subcontracted back to the agency providing services.
- Meeting the conditions for the higher federal match may require substantial increases in state expenditures that can be matched with federal funds, plus additional state expenditures for which the federal match is not available.

- The amount of funds that the federal government will make available for matching will vary from year to year. The amount of funds actually available is not announced until after the state's fiscal year begins and may vary substantially from preliminary estimates.
- In many states, the matching rate will change from year to year. This rate is available well in advance of the start of the operating year. The minimum federal share is 60 percent for eligible services.
- Failure to meet the conditions for the higher federal match will leave the state liable for the full amount of any nonreimbursable increase in state expenditures.

On Savings:

- Due to the relatively small size of the earlier experimental programs, the savings generated from welfare-to-work initiatives were primarily seen in individual cases, not in overall welfare expenditures.
- The timing and amount of savings from JOBS will depend on the types of programs offered.
- A comprehensive human investment strategy that involves education and skill training will cost more up front, since necessary preparation may prevent recipients' early departure from welfare. However, the potential for savings in years two, three, and four is much greater and possibly more long term, since recipients will be less likely to return to the welfare system.
- An approach that focuses on moving recipients quickly into the labor market, through job search and limited skill development, will be less costly initially and may produce some immediate savings. However, the savings may be only short term, since recipients may return to the AFDC rolls.
- Initially, the costs of JOBS and AFDC benefits may rise due to increased services, increased numbers of recipients, and the restructuring of management information systems to track participants and program costs. These up-front costs will normally exceed initial welfare savings from case closures.
- Projected savings can be significantly reduced by new federal mandates that may require continued Medicaid and child care benefits at income levels well above those likely to be earned by JOBS graduates. Federally mandated coverage of AFDC unemployed parents also may reduce projected savings.
- Projected savings also can be significantly affected by the same type of economic factors that are reducing state revenue estimates. It is difficult to place people in jobs during economic downturns.

On the Bottom Line:

- States should avoid the temptation to overpromise results, as it may undercut their ability to sustain long-term commitment to the program.
- States should balance the immediate impact of increased federal match with longer-term analysis of the costs and benefits of specific program options.
- States should measure benefits both in terms of reduced AFDC costs and increased quality of life for recipients.

Matching Rates for JOBS

Federal funding for JOBS is a capped entitlement. The state-by-state allocation is based on the state's number of adult AFDC recipients plus the state's 1987 WIN or WIN Demo allocation. Matching rates are computed as follows:

- Ninety percent federal financial participation for the state's 1987 WIN/WIN Demo allocation, which may be spent on any supportive service or activity for JOBS participants. The 10 percent state match may be either in cash or in kind from the IV-A agency or a third party.
- Medicaid matching rate or 60 percent, whichever is higher, for all direct costs associated with providing JOBS activities and supportive services, including assessment, employability plan development, case management, component activities, materials, and salaries and benefits for staff involved in providing these activities; and for salaries and benefits for staff working full time in any capacity in the JOBS program.
- Fifty percent federal financial participation for indirect personnel costs not covered at the higher rate; nonpersonnel costs, including space, travel, utilities, supplies, and equipment; costs of program planning, monitoring, contract negotiation, and systems development; fair hearing activities; transportation; work-related expenses; drug and alcohol treatment; other supportive services; and all other activities not covered at the higher rate.

The state match for the higher federal financial participation and the 50 percent for supportive services and administrative costs must be in cash. Policy interpretations from the Family Support Administration also indicate that, in order to qualify, all funds used for state match must be under the administrative control of the state IV-A agency. At first, this may seem a minor point, but it has developed into an issue with significant political import for state government.

For example, one state legislature agreed to increase state education funds to provide additional educational services for JOBS participants, with the expectation that the $250,000 could be used as a portion of the state match for JOBS. HHS has indicated that, in order for the funds to be considered as part of the state match, the funds would have to be transferred from the department of education to the IV-A agency and then contracted back to education for specific services.

HHS' interpretation has the potential to discourage state agencies and localities from setting aside a portion of their state program monies as state match for JOBS, thus inhibiting the state's ability to draw down its full federal entitlement. Such prescriptions from HHS also may discourage state legislatures from appropriating resources needed to implement and operate programs that could positively impact AFDC families.

Conditions for Higher Match. In an effort to avoid the potential for "creaming," or enrolling participants who are easiest to serve, Congress conditioned states' receipt of the higher matching rate on two requirements: 55 percent of all JOBS funds must be spent for individuals in specified groups; and states must have a certain percentage (e.g., 7 percent in 1991 and 11 percent in 1992) of their mandatory recipients involved in JOBS activities. The mandate that states serve individuals in three target groups is designed to encourage states to focus program resources on those identified as most at risk of becoming long-term recipients. The target groups are:

- Custodial parents under age twenty-four who have not completed high school or its equivalent or who have had little or no work experience in the previous year;
- Applicants or recipients who have received AFDC for any thirty-six of the preceding sixty months; and/or
- Recipients whose youngest children are within two years of becoming ineligible for AFDC due to age. (In the majority of states, the age limit for a child's receipt of AFDC benefits is nineteen.)

The second requirement states must meet in order to be eligible for the higher federal match is attainment of specified participation rates, beginning in fiscal 1991. This condition involves extensive tracking and monitoring of individual participants, as well as careful scheduling of activities to ensure an average of twenty hours of participation per week per individual and documenting that the individual was in actual attendance 75 percent of the time.

Penalties for failure to meet the 55 percent requirement (reduction to 50 percent federal financial participation for all expenditures) are applied retroactively to the year that the state fails to meet this requirement. Reductions in matching rates for failure to achieve participation rates are applied prospectively (i.e., failure to meet the requirement for a fiscal year will result in a reduction of the federal matching rate to 50 percent for all expenditures in the subsequent fiscal year).

A few states with significant budget problems are considering whether meeting the conditions is worth the additional expense involved in tracking costs and attendance on an individual basis and in increasing participation rates. A report by the Congressional Budget Office gives this example: State A currently spends $10 million, 60 percent of it federal and 40 percent of it in state funds ($4 million), on its existing welfare-to-work program. The state estimates that it would have to double its own expenditures to meet the JOBS participation requirement, resulting in state expenditures of $8 million ($20 million x 40 percent). If the state elects to be out of compliance, it would spend only $5 million in state funds ($10 million x 50 percent state match).

This option is less appealing if the federal financial participation rate for Medicaid is 80 percent with only a 20 percent state match.

The noncompliance strategy has both advantages and disadvantages. With declining growth in state revenues, choosing not to meet the two conditions may be an attractive alternative until performance standards are established in 1992. However, states should use extreme caution in considering this option, given the reduction in federal funds and the stigma attached to being labeled out of compliance. There is also the risk that HHS will mandate participation rates through the threat of sanctions and/or permanently lower the rate of federal reimbursement. In addition, it may be hard to explain the apparent lack of state interest in using all available funding for an education and training program with the potential to reduce long-term welfare dependency among those most in need.

State concerns about the skills of future workers, the lives of poor children, and growing welfare costs also must be factored into the equation in determining state JOBS allocations. The Census Bureau reports that an estimated 12.5 million children under age eighteen (or one out of every five) live in households with incomes below the poverty line. JOBS represents an important policy option for addressing this problem through the creation of comprehensive programs that enhance basic skills, develop quality work habits, increase individual self-esteem, and provide quality, early childhood development activities to break the poverty cycle.

Maintenance of Effort and "Not Otherwise Available." Two other requirements may affect state funding levels for JOBS. The two-pronged test imposed by the regulations involves maintenance of effort and provision of services "not otherwise available on a nonreimbursable basis " (i .e., nonsupplantation). The Family Support Administration offers this explanation for these requirements:

> *We believe that Congress intended to provide for new or increased levels of services under the JOBS program, rather than to subsidize or buy-out existing programs. We believe that Congress also intended that the JOBS program bring together and make maximum use of existing resources. The requirements of the maintenance of effort provisions of the Act, as well as language limiting funding for contracted services to services not otherwise available on a nonreimbursable basis, are tests of whether a State is, in fact, meeting these goals.*

The maintenance of effort requirement is based on the total of state and local expenditures incurred in fiscal 1986 for education, training, and employment programs that had the defined purpose of preventing welfare dependency. Expenditures to be included for fiscal 1986 are state and local funds for Title IV-A and Title IV-C work programs, including amounts for programs that were not matched; other state and local funds used for programs supporting the purpose of JOBS, regardless of federal matching; and funds spent for supportive services, including child care, to enable participation in such programs. In reporting fiscal 1986 expenditures, states need to provide only total aggregate costs. State and local expenditures for JOBS must at least equal this amount to meet the requirement.

The essential test for the second requirement of "not otherwise available" is defined in the preamble: "*that JOBS funding not be used to supplant services which the State would otherwise provide through other arrangements and sources of funds.*" The

"Maintenance of Effort"

Under WIN Demonstration authority, the human service agency in State A was operating a statewide, comprehensive welfare-to-work program for AFDC applicants and recipients. Expenditures for the program in fiscal 1986 totaled $4.3 million; state funds were $2.5 million, including a 10 percent in-kind match for the WIN Demonstration program. An additional $1 million in state funds was spent for child care.

In two county human services offices, the state education department provided special state funds of $5,000 for daytime General Educational Development (GED) classes for AFDC recipients. In fiscal 1986, two of the fifteen JTPA service delivery areas in the state were using primarily local/county funds to operate special literacy programs for AFDC recipients; expenditures were estimated at $100,000. Other state and local training programs targeting services to AFDC recipients in 1986 included job clubs in four counties, a pilot program to train recipients as nurse's aides, and a pilot program to train recipients as home repair weatherization specialists, with subsequent employment by community action agencies. It is estimated that state and local funds for these programs totaled $1 million.

Agency	*Estimated Expenditures (Fiscal 1986)*
IV-A	$2,500,000
Child care	1,000,000
Education	5,000
JTPA (local)	100,000
Other	1,000,000
Total	$4,605,000

Under JOBS maintenance of effort requirements, State A, in the aggregate, must continue to spend a minimum of $4,605,000 on education, training and employment programs, and child care. The amount may be used to continue the programs identified above, to expand other employment-related programs, and/or to create new programs as long as this level of expenditure is maintained for JOBS or on services and programs designed to "prevent welfare dependency."

reference to "a non-reimbursable basis" means that activities would have been provided even without federal matching funds. The requirement falls into two parts based on services currently available.

First, the regulations require that providers under contract or in agreement with the IV-A agency maintain the level of services guaranteed to AFDC applicants and recipients regardless of the availability of JOBS funds. Second, all arrangements and contracts must contain provider certification that the services being paid for with JOBS funds are not services that otherwise would be available to AFDC applicants or recipients under programs serving the general community, including low-income populations. State IV-A agencies that choose to provide JOBS services directly also must certify that such services are not otherwise available on a nonreimbursable basis.

"Not Otherwise Available"

Human services managers in State B have decided to contract out the majority of services and activities that will be included in the JOBS program. The following services currently are being provided by various agencies in the counties in which JOBS will be implemented:

GED Classes	**Education Department**	**6 classes @ 18 students each**
Computer-Assisted Literary Classes	**Vocational-Technical School**	**8 classes @ 10 students each**
Job Search Groups	**Job Service**	**1 class/month @ 20 participants**
Classroom Training	**JTPA**	**100 slots/year**
On-the-Job Training	**JTPA**	**50 slots/year**

The first three activities – GED, literacy classes, and Job Search groups – are available to anyone in the community on a first-come, first-served basis. Individuals participating in JTPA activities must meet that program's eligibility criteria; JTPA is serving the proportionate share of AFDC recipients as required by federal law.

Before JOBS funds can be used to expand any of these activities, each organization must provide written assurance to the state IV-A agency (the contractor) that all of the above services will continue to be available to AFDC recipients. For example, JOBS monies cannot be used to pay vocational-technical schools for additional literacy classes or for additional slots, unless AFDC recipients remain eligible to participate in existing classes to at least the same extent as prior to JOBS.

Matching Rates for Child Care

Child care is an uncapped entitlement under Title IV-A; federal financial participation is at the Medicaid matching rate or 60 percent, whichever is higher, for direct program services, and at 50 percent for administrative costs. Direct program services are identified as the actual costs of child care, not to exceed the statewide limit nor the seventy-fifth percentile of applicable local market rates. Allowable administrative costs include:

- Developing resource and referral systems for IV-A/JOBS participants or expanding existing resource and referral systems;
- Enhancing management information systems;
- Providing counseling on child care services and matching participants with available providers;
- Conducting staff development and training for IV-A employees;
- Coordinating activities to develop before- and after-school programs;
- Establishing local market rates;

- Developing and implementing sliding fee scales;
- Operating reimbursement systems for contracted providers;
- Ensuring that child care meets applicable state and local laws and health and safety standards; and
- Ensuring that parents have access to child care providers.

State Options

Under Title IV-F (JOBS), assessment of child care needs and referral to appropriate services may be matched at the higher rate if they are included as part of the JOBS assessment or case management services. The costs of orientation also may be matched at the higher rate as a JOBS activity or as IV-A expenditures, provided the orientation is provided by the AFDC worker. Orientation is defined as providing information about the program to potential participants.

The selection of funding mechanisms – either Title IV-F or Title IV-A – will depend on the amount of JOBS monies available. At least initially, the costs of client orientations, child care assessments, and referrals to providers should be billed to Title IV-A, even though federal financial participation will be at the 50 percent rate since IV-A is an uncapped entitlement. Use of this strategy leaves limited Title IV-F funds for additional program services to participants.

Transitional Services

Recognizing that the loss of child care and medical benefits often discourage AFDC clients from accepting or maintaining employment, Congress provided a bridge from dependency to self-support by guaranteeing twelve months of child care and Medicaid services to recipients who leave the AFDC rolls due to employment, either with JOBS program assistance or on their own initiative. These transitional benefits are open-ended entitlements that are funded at the higher matching rate (i .e., the Medicaid rate or 60 percent, whichever is higher). The higher federal financial participation rates for these benefits do not require states to meet the participation rates or the other conditions required for the higher matching rate under JOBS. Costs associated with transitional child care benefits are IV-A administrative costs matched at the 50 percent federal financial participation rate.

The regulations require that recipients of transitional child care contribute to the cost of such care on a sliding fee scale based on their ability to pay, as determined by the state. States may opt to charge a premium for the last six months of the twelve-month extended Medicaid coverage.

Conclusion

Many states are facing fiscal constraints. New tax initiatives have been proposed in almost all of the eastern and northeastern states. For fiscal 1990, ending balances as a percent of spending are estimated to be at their lowest level since the recession of 1983 and are forecast to drop even more in fiscal 1991. Healthier state economies will

depend upon successful strategies for improving human resource development in order to facilitate efforts by business to become more competitive and productive. Competitiveness and enhanced production ultimately depend on a quality workforce.

Projected labor and skill shortages, an aging workforce, increased participation of women in the labor market, and a growing reliance on minorities and immigrants bode well for individuals traditionally separated from employment. These same factors also call for increased expenditures by states and private industry to develop the skills required for a dynamic international economy. The JOBS program can address several of these challenges. To be effective, it will require strong leadership by Governors with a vision of improved state economies, and by legislatures with the resolve to provide adequate funds.

3. Understanding the Program Implications of JOBS Funding

Introduction

The activities and services provided under JOBS programs will depend directly on the amount of financial resources available. A recent survey of nine states conducted by the National Association of State Budget Officers and the Virginia Department of Planning and Budget reflects anticipated costs per JOBS participant ranging from $6,931 in New Jersey to $178 in Michigan. This suggests a wide diversity in program design and service intensity. Studies by MDRC on prior welfare-to-work programs involving primarily job search and work experience indicate total costs per participant of between $200 and $1,100. These figures are representative of the range of resources that states will have available for individual JOBS participants. While FSA demands that JOBS use existing resources, many of the programs to which participants and their children can be referred have already reached their capacity. FSA is designed to fill these gaps in services.

Many factors will influence how JOBS programs are designed. None will have more impact than the allocation of state resources, which, in turn, will determine the amount of federal funds available. The level of funding also will affect decisions about who will get what services, for how long, and in what sequence. States with adequate resources generally are focusing on JOBS as a human investment program with remediation and skill training, including college programs, as major components. States with more limited resources are focusing on up-front job search as the primary program component and are strictly targeting remediation services to those identified as hardest to serve (i .e., to people under twenty-four years of age who lack a high school diploma).

Program Needs

Governors also may use JOBS funding decisions as an opportunity to assess whether existing education, training, and employment programs are effectively meeting the needs of disadvantaged populations, and to ensure accountability among service providers. Current budget constraints require that limited resources be tightly focused on the objectives to be achieved, thus avoiding expenditures on programs with limited effectiveness. Governors can influence the appropriations process by making sure the right questions are asked about whether state dollars are going where they will do the most good.

Recent surveys, demographic studies, and other research may provide some guidance for determining funding allocations. Demographic studies from five states

and information from California's Greater Avenues for Independence (GAIN) program indicate that between 30 percent and 65 percent of potential participants lack a high school diploma and probably have literacy levels below the 8.9 grade level specified in the regulations. If the mission of JOBS is to develop human resources with an eye toward enhancing the pool of qualified job entrants, these educational deficiencies suggest the need for costly remediation.

Remediation of large numbers of recipients also suggests limited immediate savings in terms of case closures, with potential increases in participant earnings further down the line. Remediation further suggests higher child care costs as a result of extended participation periods. At the same time, a parent's return to school may enhance his or her child's educational pursuits, thus increasing the likelihood that the child will graduate. And, high school completion has been associated with reductions in teen pregnancy, delinquent behavior, unemployment, and the perpetuation of welfare dependency.

State demographic studies also indicate that between 3 percent and 36 percent of current AFDC recipients are employed, reflecting part-time employment, low-wage jobs, and larger AFDC grant amounts that permit continued eligibility despite earnings. Of those employed, 30 percent to 50 percent typically work four months or less per year. These statistics suggest the need for remediation and/or skill training. They also suggest that caution must be exercised in expending resources for job development in occupations with low wages and rapid turnover.

Funding levels for JOBS also will drive decisions on what amount of activities and services should be considered "enough" (i .e., how much training an individual should receive, when an individual should be considered employable, and whether an individual should be allowed to begin and complete a two-year or four-year college program).

Other important data that should be considered in establishing funding for JOBS involve the state's labor market and the needs of its employers. Various studies have predicted that there will be approximately 21 million new jobs by the year 2000, with the majority requiring some postsecondary education. Employers relay stories on a daily basis about job applicants unable to complete application forms, do simple math, or communicate ideas. The traditional labor pool of young, middle-class adults is expected to shrink significantly in the coming decade. These statistics suggest the need for a human development strategy based on the mastery of basic skills and the completion of more intensive training.

The JOBS program can assist in the creation of a motivated, qualified pool of new job entrants. The Governors' "Excellence at Work" initiative recognizes that a more highly skilled workforce can improve productivity, facilitate innovation, increase competitiveness, and foster state economic growth. Governors can play a significant role in obtaining adequate funding for JOBS by ensuring that JOBS strategies are linked with strategies for both education reform and economic development.

Program Accountability

Questions often posed by state legislators in determining funding levels for programs include the following: Who will be served by the program? What are the possibilities that they will be involved in other agency programs? What programs exist that will solve their problems? How can it be determined five years out whether the proposed program worked or not? Prior to any request for JOBS appropriations, these questions must be answered with reliable information from current demographic studies and analyses of AFDC caseloads as well as carefully designed plans for future evaluations. Answers to these questions also can provide a baseline for judging the program a success or failure and can serve as a foundation for enhanced accountability at all levels.

Another factor influencing program design and funding is the IV-A agency's track record for operating efficient and effective programs, and the legislature's subsequent willingness to allocate additional resources to the agency. Federal policy interpretations indicate that state or local funds utilized for the JOBS match must be under the control of the IV-A agency. Although many believe that this position has no statutory foundation and that other Social Security Act programs have set numerous precedents to support a viable legal challenge, states must allocate resources based on the current interpretation.

Of course, states can avoid this dilemma by increasing allocations to programs (other than IV-A) providing services for JOBS participants, including JTPA and adult education programs. They would then have to forego the enhanced federal financial participation that JOBS provides.

Conclusion

The level of funding available will significantly impact the design of JOBS programs. Creation of human resource development strategies are sorely needed to improve state economies. Remediation of basic skills will be expensive and will require a long-term commitment, but it is necessary to allow recipients to obtain jobs that will provide incomes above the poverty level.

To leverage existing resources and to increase state appropriations for education and training activities, accountability must be built into all service delivery systems. Clear goals and objectives are needed to determine whether programs providing JOBS activities are effective. Much remains to be learned about what types of programs work best for which individuals. Quality evaluations can help answer these questions and help secure the necessary funding for effective programs.

4. Forging Collaborative Partnerships

Introduction

The Job Opportunities and Basic Skills Training program gives Governors and states an unprecedented opportunity to evaluate the array of existing resources, to assess the needs of both individuals and employers, and to forge more comprehensive strategies for human and economic development. The program also provides an opportunity for state and local leaders to foster new relationships for stimulating innovative approaches to old problems.

The compelling reason for coordination and collaboration flows from a comparison of resources and needs. Most AFDC applicants and recipients have multiple needs. No one system has the expertise or the resources to provide the multifaceted services that are required to lift people out of poverty or to serve all who seek assistance.

Effective collaboration among various systems – human services, education, employment and training, health and mental health, and juvenile justice – can help ensure the provision of quality services in a cost-effective manner. Working together also creates conditions under which each system can meet its own goals, legislative mandates, and public expectations. Oklahoma's joint project with the state's Job Corps Centers is one example of a promising coordination effort that was initiated to increase female enrollments at one center.

Coordination has been defined facetiously as "an unnatural act between two or more unwilling parties." It will not be easy to overcome problems of "turf"; overlapping but not identical goals and expectations; similar but not identical target groups; distinct funding mechanisms; disparate accounting systems; and divergent governing structures. Governors are playing a key role in eliminating these institutional barriers and in promoting cooperation to facilitate efforts directed toward enhancing individual self-sufficiency.

Coordination Requirements

FSA states that the purpose of coordinating JOBS with other child care, education, training, and employment programs available in the state is to facilitate the provision of comprehensive, quality services that will meet the multifaceted needs of AFDC applicants and recipients in the most cost-effective and efficient manner. To accomplish this goal, FSA holds Governors responsible for ensuring that JOBS is coordinated with JTPA programs, employment service agencies, vocational educa-

tion programs, adult basic education programs, Head Start and other preschool programs, nonprofit child care programs, other human development programs, and public housing agencies.

ET&E and Job Corps

Oklahoma has expanded resources for its Education, Training and Employment (ET&E) Program by joining forces with the state employment service and the state's Job Corps centers. Human services staff recruit participants, conduct motivation groups, and provide child care for persons who elect to attend Job Corps. Staff from the employment service are available on the last day of the group sessions to answer questions and expedite enrollment. Job Corps provides bus service to and from the centers, conducts assessments, offers medical services not available through Medicaid, and conducts weekly peer support groups to address student problems.

Participant enrollees usually spend mornings in basic skill remediation classes and afternoons in classroom training to develop occupational skills. All classes are open entry/open exit, and individuals work at their own pace. To avoid reductions in AFDC grant amounts, Job Corps stipends for AFDC enrollees are kept in individual trust funds. The monies are given to the individual following completion of his or her training and entry into unsubsidized employment. All three agencies assist in locating jobs for participants.

The final JOBS regulations also require that the state JOBS and supportive service plans be consistent with JTPA coordinating criteria and that the plans be reviewed by the State Job Training Coordinating Council prior to submission to HHS. At the local level, the IV-A agency must consult with the JTPA Private Industry Council to develop contracts under JOBS and to determine the types of jobs that are or will be available in each community. All coordination efforts must be described in the state's JOBS plan.

Suggestions for Effective Collaboration

Although there is no magic formula, several important factors can facilitate collaboration. Effective collaboration requires strong and active gubernatorial leadership to ensure that agency officials put aside traditional differences and focus on using FSA to create institutional change. This will ensure both effective use of resources and accessibility of services to those who need them.

Effective coordination also will require mutual agreement among all agencies regarding what common mission or goal they are striving to achieve, which individuals can be jointly served, what problems or barriers these individuals face, which agency can best address the problems, and how outcomes will be measured. Where possible, human services (JOBS), JTPA, and adult and vocational education should agree on common referral and intake forms and methods for measuring participant progress.

To facilitate client accessibility and improve service delivery, states may wish to experiment with colocation of staff as in Pennsylvania's Single Point of Contact Program. Paramount to the success of such projects is an understanding of each agency's strengths and weaknesses, a detailed discussion of funding levels and sources, and a willingness to combine resources to improve existing programs or to create more effective ones.

Innovative approaches to service delivery also will require a regular forum to review progress and resolve problems. Each agency should assign staff to an ongoing group that has the authority to address issues as they arise. Experience has shown that it is often easier to establish specific dates and times for regular meetings at the outset rather than to try to find time after problems have gotten out of hand. Frequent interaction among all parties also encourages the free exchange of ideas and promotes an atmosphere of trust.

Finally, an independent party could be selected to analyze and evaluate additional possibilities for collaborative efforts, such as joint funding of programs and integration of resources. In addition, quality, ongoing evaluations will be necessary to gauge whether interagency collaborations are working in terms of compliance with federal participation quotas, monitoring the flow of information between agencies, measuring time lags between referrals and actual placement in a component and between component assignments, and assessing the quality of service. The more extensive collaboration is, the more essential evaluation becomes, lest participants get lost as they move among delivery systems.

Single Point of Contact Program
"One-Stop Shopping"

The Joint Jobs Initiative was launched in Pennsylvania in 1987 to improve the existing job training system. As part of this initiative, the Single Point of Contact (SPOC) Program was established to demonstrate the effectiveness of coordinated service delivery based on one contact for all services. The program has been integrated into New Directions (the state's JOBS program) and is operated jointly by Department of Public Welfare county assistance offices, JTPA agencies, and Job Service (Department of Labor) staff. All staff are colocated in all county offices.

To marshal the widest possible range of services at one single location, funds are combined from JOBS, special state monies, the Department of Labor, JTPA, and the Department of Education. A key feature of the program is a single application that satisfies the requirements of all agencies, so that participants need not complete different applications. SPOC focuses on JOBS target group members and provides intensive case management, career exploration, education, vocational training, work experience or on-the-job training, job readiness training, job placement, and post-placement follow-up for clients most in need of specialized services.

Governor's Role

In addition to getting all the relevant players to talk to one another, Governors can influence the appropriations process by providing the incentive for agencies to link resources. Current budget constraints demand that agencies avoid duplicating services and use their existing resources more effectively.

The requirement that all states submit new JOBS and supportive service plans by mid-August 1990 presents a good opportunity for Governors and their staff to review state JOBS implementation efforts. Plans severely lacking in coordination can be returned with suggestions for improvements. At a minimum, Governors can raise questions about the lack of joint efforts.

If not done previously, the review process might also include one-on-one discussions with state human service administrators, JTPA administrators, and state school superintendents to solicit their views on collaborative partnerships. Other officials from the education community and from various service agencies (e.g., health and mental health) also could be invited to express their ideas.

Governors also have proven effective in stimulating interest about welfare-to-work initiatives among private employers. As chief speaker for their state, Governors can help all agencies in marketing JOBS programs to private industry and the general public, emphasizing the importance of giving each citizen the opportunity to become self-supporting. Governors also can support program award ceremonies that reward participants as well as their employers. In addition, program marketing brochures might include a quotation from the Governor about the role JOBS can play in preparing children for school, enhancing programs for at-risk youth, creating family literacy programs, reducing teen pregnancy, and establishing a more qualified workforce for state employers.

Conclusion

Governors were primarily responsible for the design, passage, and approval of the Family Support Act. It will be unfortunate if other priorities interfere with their initial vision for refocused welfare programs and improved service delivery systems.

Millions of people currently receiving public assistance need to work and are willing to work. Often, they are frustrated in their efforts to obtain the help they need by complicated, bureaucratic mazes of disconnected services. In their continuing effort to see that all individuals in their states have the opportunity to become productive members of society, Governors can play a key role in untangling the maze by encouraging each agency to simplify policies, streamline procedures, and pool funding streams. Such efforts will enable persons in search of services to find them and to obtain the help they need to improve their lives and the lives of their families.

5. Engaging the Education System

Introduction

The education community is instrumental to the success or failure of the JOBS program. Governors and others recognize that education is the key to a healthier economic future for localities, states, and the nation. Schools at all levels may be the most effective institutions in the community for developing programs to serve all family members and, subsequently, to break the cycle of poverty.

There is strong empirical evidence that education is crucial for even minimal economic success. Studies on youth suggest that the attainment of each grade-level-equivalent of basic skills has the potential to increase mean annual earnings from $715 to $1,500 per year. Individuals with low basic skills are twice as likely as those with higher grade levels to be poor or jobless, or in jail. An increase in basic skills equivalent to one grade level decreases the likelihood of out-of-wedlock births, welfare dependency, and arrests by 6.5 percent, 5.3 percent, and 6.2 percent, respectively.

Education also is the most potent avenue for escape from welfare and poverty, both for teen parents and for those who are older. Parents, especially mothers, who return to school are more likely to marry and more likely to work. In addition, a mother's return to school usually results in significant improvements in the educational achievement of her children.

Research has shown that one of the most effective methods for improving children's performance in school is to involve their parents in the education process. One way to increase parents' involvement is to have them participate in school activities, including the tutoring of individual students. Experience also has shown that exposure to education increases the adults' interest in furthering their own educational goals. FSA gives states and localities the chance to expand such efforts through the educational components of the JOBS program.

The majority of new jobs between now and the year 2000 will require higher levels of analytical, problem-solving, and communication skills. It is estimated that more than half of all jobs will require a postsecondary education, which also may be the most viable route out of poverty for families headed by single women. One study estimates that females with college degrees earn as much as 54 percent more than their counterparts who have only high school diplomas.

Poverty rates for young women with a postsecondary education also are significantly lower. In 1986 approximately 60 percent of families headed by young women with a high school education had incomes below the poverty level, while only

8.5 percent of college-educated women with families were in this category. Again, these statistics suggest the importance of JOBS as a human resource development strategy and highlight the importance of the educational components.

Education Requirements

A review of the JOBS regulations reveals the heavy emphasis placed on providing educational services to recipients. FSA targets services to custodial parents under age twenty-four who lack a high school diploma or its equivalent. To assure that this population acquires the skills necessary to succeed in the labor market, FSA mandates that they participate in various educational activities. The JOBS regulations provide that:

- All individuals ages sixteen and seventeen (both parents and youth who are not in school) must return to high school or participate in courses that will lead to attainment of a General Educational Development (GED) certificate, or in other educational activities, or in educational activities that are combined with training.
- Individuals who are eighteen and nineteen years of age may be assigned to training or work-related activities in lieu of educational activities if educational activities are inappropriate, or if the individual has failed to make good progress.
- Individuals age twenty or more must participate in educational activities that are consistent with their goals for employment unless they demonstrate a basic literacy level (a level equivalent to at least grade 8.9) or have a long-term goal that does not require a diploma.
- Exceptions to participation in educational activities must be decided on an individual basis. Achievement of a certain grade level does not automatically excuse an individual from participation.

Implications for the Education Community

For the education community, the regulations mean that dropouts can be required to return to middle or high school; classes and schedules may require restructuring to accommodate the needs of young parents; the capacity of alternative schools may need to be expanded; enrollments in literacy, adult education, and GED preparation classes will increase; training programs that include a focus on basic skills may need to be created; and numerous young children may need child care and quality early childhood development programs. The participation requirements also mean that, in many instances, individuals will attend school only because they must be there to remain eligible for AFDC. This situation will make it even more essential to provide instruction that is interesting and relevant.

Many of the former dropouts who will be required to return to school will have low self-esteem, a history of failure in the classroom, low skills, and personal and family problems that, unless alleviated, will constantly interfere with the learning process. Through JOBS, FSA presents the opportunity and additional funding to help

educators launch creative and innovative approaches to instruction, and to make learning exciting enough that individuals will overcome these barriers and be willing partners in the process. Educators also can begin to recruit human services personnel to provide supportive services, such as case management and child care, to enable students to obtain the most benefit from educational activities.

The JOBS program can be used to strengthen the role of parents as their children's primary educator, by forming comprehensive community strategies to produce two-generation educational programs. JOBS also can serve as the catalyst for strengthening early childhood development programs such as Head Start, and for linking child health services such as the Early and Periodic Screening, Diagnosis and Treatment (EPSDT) program with case management and other supportive services.

Involving the education community in the implementation of JOBS presents a formidable challenge for Governors, human service administrators, and state and local education officials. The U. S. education system includes an array of providers delivering diverse services to individuals of all ages with varying backgrounds. The diversity is both the system's strength and its weakness.

Each level and focus of education – elementary and secondary, postsecondary, adult, technical, and vocational – has different governing bodies, operating structures, political constituencies, funding sources, and philosophies. This diversity must be acknowledged and addressed prior to development of collaborative strategies for meeting the needs of JOBS participants. While most educators are willing to cooperate, most do not know what their role in JOBS should or could be.

In addition, most education staff have little or no understanding of the human services or the employment and training systems. Neither do most human services or employment and training personnel understand the education system. To complicate matters even further, education is a highly decentralized public service. Comprehensive information concerning available programs, funding mechanisms, and class schedules generally is not obtainable from one entity at one location. This diversity requires that coordination occur at the local level, often on an individual "building" basis. Such decentralized administration also increases the time and energy required to make collaboration effective.

Some guidance for working with education may come from the experiences of the JTPA system in providing educational services for at-risk youth. In many communities, successful linkages between JTPA and education have been formed to provide literacy instruction, vocational training, alternative secondary programs, mentoring activities, work experience programs, and activities to promote high school completion. The Summer Training and Education Program is an example of a collaborative effort among JTPA, education, and others that allows all players to benefit. Helpful hints also may be gleaned from JTPA experiences in working with community-based educational services, community colleges, and vocational-technical schools. Rather than reinvent the proverbial wheel, Governors can facilitate discussions between JTPA and human services officials to find out how the process works best and why. Joining Forces, the jointly supported project of APWA and CCSSO that promotes collaboration among the education, welfare, and child welfare systems to

help schools improve education-related services for at-risk families, also might provide guidance for creating successful linkages between human services and education.

Summer Training and Employment Program

The Summer Training and Employment Program (STEP) is a collaborative effort to keep youth ages fourteen to fifteen in school, reduce teen pregnancies, improve graduation rates, and better prepare young people to enter the labor market. Funded and operated jointly by JTPA (Summer Youth Employment and Training Program), schools, and community-based organizations, the program includes half-time, paid employment combined with half-time basic skills remediation and life skills instruction during two summers, and one school year of counseling, tutoring, mentoring, and other supportive services.

STEP was designed and tested by Public/Private Ventures in 1984 and has been replicated at more than fifty sites. Results from demonstrations in five sites involving 4,800 youth reveal that STEP youth showed gains in both reading and math and increased knowledge of how teen parenting can spoil their life chances. Follow-up research on this group will continue through 1993.

Goals, Roles, and Priorities

In addition to extensive coordination at both the state and local levels, successful implementation of the educational components of JOBS will require the development of new relationships and roles between welfare and education and among other organizations involved in creating new service delivery systems to enhance individual achievement. Governors can take the lead in facilitating institutional change in a number of ways.

Governors can request that both the welfare and the education system reach agreement on the goal of the collaborative efforts and the purpose of the educational components. Should the goal be to employ participants as quickly as possible, ensure their attainment of educational credentials, or improve their basic skills as measured by competency-based outcomes? From a broad policy perspective, setting goals enables both systems to define objectives. It provides a common basis so that recipients, legislators, employers, advocacy groups, the media, and others can judge the success or failure of the program. Clearly defined goals also enhance relationships among systems and provide guidance to local staff who are often given responsibility for coordinating programs.

The process of setting goals for welfare/education activities has other advantages. It can help identify gaps in available resources, populations to be served, curriculum changes needed to make learning more interesting for those who are not enrolled by choice, and innovative approaches to meeting needs. The process also can underscore the fundamental need to restructure the delivery of educational instruction and thus can provide the basis for consensus on strategies for reaching the goals.

Defining goals is a critical step toward implementing the performance-oriented accountability systems necessitated by limited budgets and employer demands for more competent employees. Holding providers responsible for required results helps identify inappropriate activities and determine what works best for particular populations. Without goals there is no effective way to identify the need for improved curriculums, more flexible scheduling, better counseling, improved attendance and performance monitoring, increased supportive services, and flexibility in school policies.

In addition to ensuring the establishment of clearly defined goals, Governors might consider the possibilities of linking current education reform efforts to systemic reform efforts in the delivery of human services and employment and training programs. High school dropout rates reflect not only the inadequacy of existing secondary school programs, but also numerous societal problems. Research has documented that family difficulties, teen pregnancies, and poverty rank high on the list of reasons for individuals leaving school. By restructuring service delivery systems to address these problems more effectively, "second chance" programs will be more likely to help individuals reach their full potential.

Successful linkages with education also may be the key to breaking the cycle of poverty and preventing welfare dependency by the next generation. Governors recognize the fundamental need for early childhood intervention programs, such as Head Start, and school readiness is one of their national goals for education. The critical role of parents as their child's first teachers is likewise acknowledged and is included as an objective of the first education goal. The JOBS and supportive service provisions of the Family Support Act can be used to help achieve the goal of school readiness by creating all-day, "wrap-around" Head Start programs, and quality before- and after-school programs for children in AFDC households as well as other children. The objective can be partly accomplished by combining Even Start grants and other education monies with JOBS funds to create intergenerational literacy programs for AFDC families.

The objective of preparing parents to be their child's first teacher also can be furthered by recruiting AFDC/JOBS participants to serve as tutors in elementary and secondary schools through work experience placements or on-the-job training positions. Supportive service funds under JOBS can be used to establish mentoring programs for at-risk youth. In those schools that have established Family Support Centers, JOBS funds can be used to enhance and expand case management services and to add family literacy programs.

Similarly, JOBS and the push for education reform can serve as the impetus for restructuring education and human services systems to make both more responsive to the needs of disadvantaged families. At a minimum, Governors can strive to create comprehensive strategies to more effectively address the needs of families at risk, including stimulating collaboration across agencies to provide more comprehensive programs for at-risk youth; insisting on increased teacher flexibility to develop more effective methods of instruction; encouraging additional outreach efforts to involve parents in their children's education; fostering innovative approaches for combining educational and work skills; and linking rewards and sanctions to performance.

National Goals for Education: Readiness and Literacy

Readiness

Goal 1: BY THE YEAR 2000, ALL CHILDREN IN AMERICA WILL START SCHOOL READY TO LEARN.

Objectives:

- **All disadvantaged and disabled children will have access to high quality and developmentally appropriate preschool programs that help prepare children for school.**
- **Every parent in America will be a child's first teacher and devote time each day helping his or her preschool child learn; parents will have access to the training and support they need.**

Adult Literacy and Lifelong Learning

Goal 5: BY THE YEAR 2000, EVERY ADULT AMERICAN WILL BE LITERATE AND WILL POSSESS THE KNOWLEDGE AND SKILLS NECESSARY TO COMPETE IN A GLOBAL ECONOMY AND EXERCISE THE RIGHTS AND RESPONSIBILITIES OF CITIZENSHIP.

Objectives:

- **Every major American business will be involved in strengthening the connection between education and work.**
- **All workers will have the opportunity to acquire the knowledge and skills, from basic to highly technical, needed to adapt to emerging new technologies, work methods, and markets through public and private educational, vocational, technical, workplace, or other programs.**

NOTE: These goals are two of the six goals adopted by President Bush and the Governors in February 1990.

SOURCE: National Governors' Association, *Educating America: State Strategies for Achieving the National Education Goals* (Washington, D. C.: National Governors' Association, 1990).

Another possible connection between JOBS and efforts to reform education is the Governors' emphasis on providing opportunities for every adult to become literate and obtain the skills necessary to compete in a global economy. Institutional changes in the welfare and education systems must include changes in the employment and training system to make it more responsive to adult learners and their needs. Inherent in this activity is a review of system capacities to identify gaps and to determine which system can best fill them. As with welfare/education programs, common goals must be agreed to and performance-oriented accountability built in.

As state budgets become tighter and demands for state dollars increase, Governors are working to establish priorities and stimulate collaborative ventures among all the various players. The work groups created to identify strategies for

achieving the national education goals recognize the importance of fostering systematic structural and cultural change, and the wisdom of approaches that reach across agency boundaries to form a cohesive package. Recognizing that everything cannot be done at once, states will need to choose their priorities and take advantage of opportunities. This must be done in the context of a long-term, strategic plan for human and economic development.

Conclusion

A report by the Committee for Economic Development indicates that providing intensive educational and support services to Job Corps participants returned $7,400 per individual for every $5,000 in program costs. The report further notes that for every $1.00 invested in quality preschool programs for low-income students, $4.75 is saved through lowered future costs of special education, welfare, and crime. Both the Job Corps and the preschool savings are applicable to JOBS since participants and their children will need similar interventions to be successful in the labor market.

Increased lifetime earnings, subsequent new tax revenues, and nonpayment of public assistance also should be factored into the cost/benefit analysis of providing educational services to welfare recipients. Other considerations are the potential decreases in the number of out-of-wedlock births and in the number of disadvantaged children who fail to complete high school.

The evidence is clear. The technological nature of today's society demands a pool of competent workers who have the ability to learn new skills and to adapt to a constantly changing environment. A shrinking workforce requires employers to turn their attention to persons traditionally locked out of the labor market. For this nation to compete effectively in a global economy, education and training must be available to those who need these services so they can become part of the economic mainstream. Collaboration between JOBS and education is imperative. Although this will require resources in terms of staff time and program funding, the investment will yield significant dividends.

Appendix:
List of JOBS Implementation Surveys

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